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Office of Personnel Management

# **Financial Clerical and Assistance Series**

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**Financial Clerical and Assistance Series**

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## **SERIES DEFINITION**

This series includes positions the duties of which are to perform or supervise clerical or assistant work in support of accounting, auditing, budgeting, or financial management functions when no other established series in the Accounting and Budget Group, GS-500, is appropriate. The work requires a knowledge of the procedures and techniques involved in carrying out the work of an organization and involves application of procedures and practices within the framework of established guidelines.

This series definition supersedes the definition of the General Accounting Clerical and Administrative Series, GS-501, dated June 1967. The new definition of the Financial Clerical and Assistance Series, GS-503, covers only the clerical and assistant one-grade interval work of the previous GS-501 series definition. The administrative program and other two-grade interval work is covered in the revised Financial Administration and Program Series, GS-501.

## **COVERAGE**

This purpose of this series is to cover one-grade interval work which is classifiable in the Accounting and Budget Group, GS-500, but which is not covered by another established series. The essential criteria for classifying positions in this series are that:

1. The work is in support of or pertains to accounting, budget, financial management, or fiscal operations;
2. The primary work of the position is one-grade interval in nature; and
3. The primary work of the position is not classifiable in any other series.

## **EXCLUSIONS**

1. Positions that require knowledges of double entry accounting techniques and procedures (but less than full professional knowledges) should be classified to the Accounting Technician Series, GS-525.
2. Positions that involve work which requires knowledge of specialized processes or subject matter for which a specific series exists. Such positions should be classified in the appropriate, specific series, e.g., Payroll Series, GS-544, Voucher Examining Series, GS-540, or Budget Clerical and Assistance Series, GS-561.

3. Positions which cannot be identified with a specialized series, but are covered by another occupational group that has a general or miscellaneous series. Such positions should be classified in that series, e.g., the General Business and Industry Series, GS-1101.
4. Positions that involve a mix of (1) typing or stenography and (2) clerical work which does not require specialized subject matter knowledge (and which does not meet the definition of the Secretary Series, GS-318). If a qualified typist or stenographer is needed, the position should be classified in, respectively, the Clerk-Typist Series, GS-322, or the Clerk-Stenographer and Reporter Series, GS-312.
5. Positions that primarily involve two-grade interval administrative or program work of an accounting, budget, or fiscal nature for which there is no appropriate series. Such positions should be classified in the Financial Administration and Program Series, GS-501.

## **OCCUPATIONAL INFORMATION**

Financial Clerical and Assistance work is one-grade interval work in the Accounting and Budget Group, GS-500. A number of specialized one-grade interval series have been established that collectively cover most of the one-grade interval work in the GS-500 group; however, these are highly specific, relating to discrete functional areas such as voucher examining, time and leave, or payroll operations. The GS-503 series covers work that is not readily classifiable in another more specific series, or that includes a combination of work classifiable to two or more series in the GS-500 group when no one series predominates.

Clerical work may involve compiling figures, maintaining records, compiling reports, or performing other procedural work which represents the transactions or business of an organization. The General Grade-Evaluation Guide for Nonsupervisory Clerical Positions, dated

January 1979, contains a comprehensive discussion of the nature of clerical work. Assistance work involves various kinds of duties which require applying a practical knowledge of regulations and precedent cases. Assistants apply specific procedures and established methods. Some assistance work may involve specialized nonadministrative work preparing data for automated financial systems or may support professionals by writing synopses of audit or financial reports or deciding entitlement against definitive criteria.

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The discussion of accounting technician work in the Accounting and Budget Group, GS-500, Distinguishing Professional from Nonprofessional Accounting Positions presents valuable criteria concerning the nature of assistance work.

## **SERIES DETERMINATION**

Most clerical or assistance positions classified to the Accounting and Budget Group, GS-500, can be identified with a specific series which covers the work. When a position involves mixtures of work classifiable in more than one occupational series, the position should be classified in accordance with the principles for classifying mixed series work. In this regard, the Financial Clerical and Assistance Series, GS-503, is considered a "General Series"

(covering both work

not elsewhere covered and work which is a combination of that covered by two or more series). Wherever practical, however, a dominant series should be selected. In some cases, the grade controlling duties will determine the series; in other cases, such considerations as the basic

purpose of the position, line of promotion, and source of recruitment will determine the series. If, after consideration of the foregoing, no particular series dominates, the position may be classified to the Financial Clerical and Assistance Series, GS-503.

## **TITLES**

Titles are not specified for positions classified to this series. In constructing titles, follow the guidance in Position Classification Standards -- General Introductions, Background and Instructions.

## **EVALUATION OF POSITIONS**

Nonsupervisory positions performing clerical duties should be evaluated by the General Grade-Evaluation Guide for Nonsupervisory Clerical Positions. Published standards covering specific clerical occupations may be used for cross reference for the evaluation of clerical positions if the work is analogous.

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Nonsupervisory positions performing assistance duties or that are otherwise excluded from coverage by the Guide for Nonsupervisory Clerical Positions are to be evaluated by reference to standards of the one-grade interval type that involve analogous knowledges and skills; e.g., Accounting Technician Series, GS-525, Management Clerical and Assistance Series, GS-344.

Positions classified in this series that meet the criteria of the Work Leader Grade-Evaluation Guide for evaluation as leaders are to be evaluated by that guide. Positions classified in this series that meet the criteria of the Supervisory Grade-Evaluation Guide for evaluation as supervisors are to be evaluated by part I of that guide.